



# CONFERENCE APPROVAL PROCESS

## Travel to a Conference

AAG01-10 REV 0 – May, 2007

*at a glance*

For complete information go to **Berkeley Lab Conference Services** (<http://www.lbl.gov/Conferences/>) or  
**ESD Business Practices: Conference Approval** ([http://www-esd.lbl.gov/workplace\\_resources/business\\_practices/conferences.html](http://www-esd.lbl.gov/workplace_resources/business_practices/conferences.html))

### Is your Event a Conference?

Any meeting, seminar, retreat, symposium, or similar event that involves official overnight travel could be considered a “conference.” The DOE, Office of Science Conference Order covers conferences held on-site at LBNL and when LBNL employees attend off-site conferences. To help determine if the event you are traveling to is a “meeting” or “conference”, please do the following:

- Complete the attached Conference Questionnaire. (see back)

NOTE: The DOE Order excludes the below types of events from the requirements:

- Formal structured training programs, including seminars/workshops held for training purposes.
- Conferences not funded by DOE (e.g. WFO; Royalty; Administrative Fund, Gifts, etc.)
- Meetings only requiring Local Travel
- DOE technical program, project or peer reviews
- Audit, inspection, and investigation activities
- Contract proposal, bid opening and negotiations
- Public hearings and associated briefings
- Employee traveling to site where DOE work is being performed to review work status

### Your Event is a CONFERENCE:

- At least 60 days prior to the Conference, provide the ESD Senior Administrator (Lisa Kelly, [LMKelly@lbl.gov](mailto:LMKelly@lbl.gov)) with the following information:

- Completed [Conference Questionnaire](#)
- Name of Conference and location
- Dates of Conference (not travel dates)
- Dates of travel – best estimate
- Project ID and Funding Source (BES; BER; WFO; etc.)
- Estimated Costs (Air; Lodging/Per Diem; Registration Fee; Other)
- Names of other LBNL participants (if known)

- Upon receipt of the above information from the conference attendee, the ESD Senior Administrator will:

- Update the [ESD Conference Tracking Worksheet](#), and, if necessary
- Complete the [Conference Request and Authorization Form](#), submit for approval to the ES Division Director and forward to Conference Services for further processing.
- Refer to the [Conference Approval Flowchart](#) for details on this process

- Conference Services will directly notify the conference attendee of the approval/disapproval prior to your departure date.

**NOTE: YOU MUST HAVE APPROVAL TO ATTEND THE CONFERENCE BEFORE DEPARTING**

### KEY RESOURCES:

- Berkeley Lab Conference Services – Jill Stark x5683( [JSStark@lbl.gov](mailto:JSStark@lbl.gov))
- ESD Travel Coordinators:
  - Bldg. 90/14C: Helen Strohmeier x6455 ([HGStrohmeier@lbl.gov](mailto:HGStrohmeier@lbl.gov))
  - Bldg. 70/70A/64: Theresa Pollard x6740 ([TAPollard@lbl.gov](mailto:TAPollard@lbl.gov))
  - ESD Conference questions: Lisa Kelly x5041([LMKelly@lbl.gov](mailto:LMKelly@lbl.gov))

## QUESTIONNAIRE TO DETERMINE IF A MEETING/EVENT IS A CONFERENCE

Please circle your answers to each question.

<i>Is the event held locally, with no overnight lodging and/or air travel for DOE/DOE Contractor employees?</i>	Yes	No
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<i>Is this a DOE funded event to discuss a technical program, business program, project review or peer review?</i>	Yes	No
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<i>Is this event funded by a Work for Others account? (work conducted by DOE Contractor employees)</i>	Yes	No
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<i>Is this a formal, structured training program (including seminars specifically held for training purposes) that have specific objectives identified to improve certain knowledge, skills and abilities?</i>	Yes	No
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<i>Is this a Federal Advisory Committee meeting?</i>	Yes	No
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<i>Is this a contract pre-proposal, bid opening, or negotiations?</i>	Yes	No
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<i>Is this a public hearing or an associated briefing?</i>	Yes	No
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<i>Is this activity an audit, inspection or investigation?</i>	Yes	No
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<i>Is this event held on-site at a DOE facility to discuss the status of the work?</i>	Yes	No
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<i>Is this event funded through arrangements such as a grant or cooperative agreement?</i>	Yes	No
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If **yes** to one of the above questions, the event is **not** a conference and does **not require** Lab Directorate, DOE BSO or Office of Science approval. If you are hosting a meeting, please complete a Laboratory-Hosted **Meeting Request Form** and required attachment.

If **no** to all of the above questions, the event **is** a conference and **may require** Lab Directorate, DOE BSO and/or Office of Science approval. Please follow the directions provided on the [ESD Conference Approval Process at a glance.](#)

Should you have questions, please contact Lisa Kelly x5041